

Message: RE: A2A Database Issues**✉ RE: A2A Database Issues**

From Kraft, Emily
To Berhorst, Leslie
Cc

Date Tuesday, February 14, 2017 10:50 AM

I don't recall there ever being any emails discussing it, so it would have had to have been some of the early meetings when the dropdown menu filtering idea was presented/displayed to me when the functionality was discussed. It's entirely possible that I assumed something from that meeting that was never ITSD's intention to be how it worked, and that difference just wasn't apparent until now.

At this point, I'm not sure that any of the contractors would have tried using the client reassignment functionality. It works fine for me in test, but they always seem to find some issues, so we'll see.

From: Berhorst, Leslie
Sent: Tuesday, February 14, 2017 10:31 AM
To: Kraft, Emily
Subject: RE: A2A Database Issues

It has been awhile, but not sure if you recall this also coming up during your testing of the application? I couldn't find the email regarding the past discussion, but it may have been a verbal conversation (can't remember)? Nonetheless, the system was designed from the beginning to look at who's logged in and that's who the client is assigned to; unfortunately it would be a pretty significant update to the system to change it. Is the client reassignment functionality working okay for the users?

From: Kraft, Emily
Sent: Tuesday, February 14, 2017 9:54 AM
To: Berhorst, Leslie
Subject: RE: A2A Database Issues

It had been my assumption when we created the database that when a contractor or subcontractor filled out an intake form for a new client and selected an employee from the dropdown menu, that it would be assigning that client to the employee selected. It was my understanding that the client reassignment page was intended for situations in which the client's original user assignment needs to be switched to someone else, like if an employee resigns and a client needs to be assigned to a different case manager or if the client moves out of a contractor's service location and needs to be transferred to a new A2A provider in the area.

I can direct subcontractors to the client reassignment page to correct client assignment, which will address the current issue. However, if it wouldn't be terribly difficult to fix in the future, it would be most convenient for the client to assign to the selected user in the selected intake form dropdowns.

From: Berhorst, Leslie
Sent: Monday, February 13, 2017 10:42 AM
To: Kraft, Emily

Subject: FW: A2A Database Issues

Meant to send you this the other day....in regards to the client assignment issue:

From one of the bulleted issues below, “•When a subcontractor enters a new client intake form and assigns it to an employee, the employee is unable to see that client’s data when logged in.” Is it correct that the subcontractor is logged in and entering the new client intake form and expecting it to be assigned to an employee of theirs? If so, this isn’t how the system was designed. Whoever is logged in entering the form is who the client becomes assigned to. This is why the client reassignment page was created. It has to be used to reassign clients to a user other than the one who first entered the form. Does that help? Please let me know if you would like to discuss further or if you have any questions.

From: Kraft, Emily**Sent:** Tuesday, February 07, 2017 8:18 AM**To:** Berhorst, Leslie**Subject:** RE: A2A Database Issues

So I tested the client assignment issue this morning. While logged in as a contractor, I attempted to create a new client and attempted to assign the client to an employee during the intake form completion. After saving the client’s data, I attempted to bring up the client’s intake form under the employee, and it showed no clients listed for that employee and the client intake form was located under the contractor. I then tried to assign the client to the employee using the Client Reassignment page. Once I do that, the client shows up on the intake form page assigned to the employee, and when I logged in as an employee, I was able to see the client’s intake form data.

I also ran through the Birthing Outcome and EPDS forms, but didn’t have any trouble saving them. Still not sure what the issue is with those yet, but will pass along more info as I get it.

From: Berhorst, Leslie**Sent:** Monday, February 06, 2017 3:52 PM**To:** Kraft, Emily**Subject:** RE: A2A Database Issues

Responses in blue.

From: Kraft, Emily**Sent:** Monday, February 06, 2017 3:48 PM**To:** Berhorst, Leslie**Subject:** RE: A2A Database Issues

See responses in green.

From: Berhorst, Leslie**Sent:** Monday, February 06, 2017 3:35 PM**To:** Kraft, Emily**Subject:** RE: A2A Database Issues

Please see comments in red below:

New A2A Database Issues

- Need to delete Angelica O'Neill's subcontractor account (Our Lady's Inn – St. Charles) so she can get set up as an employee at Our Lady's Inn – STL – **please submit OHD ticket** Done
- Change Mother's Refuge email from Robert@mothersrefuge.org to programdirector@mothersrefuge.org - **please submit OHD ticket** Done
- When a subcontractor enters a new client intake form and assigns it to an employee, the employee is unable to see that client's data when logged in.
 - Issue for Regina at ThriVe (assigning clients to Julia Guariglia)
 - Same issue for Lori Amato at LifeLine Pregnancy Care Center
 - Waiting on list from these users regarding which clients should be seen for each user. –
will need this information before we can troubleshoot. Do you recall having issues with this during testing? I don't recall noticing anything like this. I can go back and look specifically at this in the test environment tomorrow morning if that would help?
It would be helpful. Please also run through the forms the users are having issues with and see if the same thing is happening for you in test. I didn't recall running into any of these issues during testing either, so it's unexpected that it's happening in production now.
- Whenever Denise Wilkinson at Catholic Charities of Southern Missouri logs in, it's saying "Welcome Cathycsomo" rather than "Welcome Denise". – **assuming this is the right account, her information is in the system as First Name: Cathy and Last Name: CCSOMO, email address dwilkinson@ccsomo.org** – so it's pulling what she entered in the system **Good catch. I fixed it on my end. Thanks! 😊**
- Gina at ThriVe is having issues with the database telling her in the client intake form that there has been 30 minutes of inactivity and that she has been timed out, but she has not been logged in for 30 minutes for that to actually be the case. She has also received this same message when moving from her profile page into the client intake form. She has tried exiting the browser and logging back in and the problem persists. **Do you know if anyone else is having this same issue? Not sure what's going on with this, we'll have to look into.**
- Lori Amato at LifeLine Pregnancy Care Center has noticed the client intake form "refreshing" or clearing all entered data halfway through the form.
 - A user at Catholic Charities of Southern Missouri had the same issue at least 8 times during the time it took her to input 19 clients.
 - Gina and Carolyn from Thrive noticed that when they select drop down menus on the intake form or the FOB info section on intake form, that the previously entered info disappears. May be – **this is all very odd! Will look into and see what's going on.**
- Teresa at Alternatives clinic is having trouble with birthing outcomes and EDPS forms. Unsure of the specifics of this one at this time, but have asked for more info and any relevant screenshots.
- Megan at Nurses for Newborns noticed that the intake forms seem to refresh when she's tabbing from field to field, particularly when she gets to the assessment date field. **Is it**

causing issues when the page 'refreshes'? Yes, it deletes out everything that had been entered into the fields. This may be related to the issues experienced by Lori, Gina, and Carolyn above.

- Megan at NFN also noticed that she had to repeatedly select the County field because it didn't "stick" the first time she selected the county.
- Pam Elledge at Catholic Charities of Southern Missouri (Whole Kids Outreach) and LaTasha Bashley (also at CCSOMO) cannot change their passwords when setting up their accounts. I have the screenshots of both attached. Do you know if Pam tried the code within one hour or the time the email was sent? Also, did she ensure she did not copy any trailing spaces at the end of the code? I've also asked the tiger team to look into these since they deal with Mo Login, but have a feeling those will be the first questions they ask. Yes, both people were on the phone with me while trying to reset their passwords, so I know it was less than an hour from the time they received the password reset code to the time they tried using it on the password reset page. Also, I specifically directed them to check for extra spaces. Perfect! I'll let Tiger Team know these items have been checked. Thank you!

Old A2A Database Issues

- Now that it is February, the old database is requiring the annual financial update. Is there any way this feature can be easily disabled on the old database, so that users can finish up the last old contract IPCP entries without having to do this? – Please submit an OHD ticket for this. We will have to research to see if this is possible. Will be doing here in a sec.

From: Kraft, Emily
Sent: Monday, February 06, 2017 3:03 PM
To: Berhorst, Leslie
Subject: A2A Database Issues

Hi Leslie,

Per our discussion, here is the list of issues compiled from late last week. Additionally, the screenshot for ticket #2434199 is included. I will forward additional information as I receive it. Let me know if you need me to ask for anything specific.

Thanks,

Emily Kraft
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